



Using Digital Messaging to Support Newcomer Communities

A Toolkit for
Individuals and Organizations



DIGITAL MESSAGING
FOR SETTLEMENT
AND INTEGRATION

Acknowledgements

The Digital Messaging for Settlement and Integration (DMSI) project is all about connecting newcomers with the information they need to successfully settle in Canada, when and where they need it. As a communications and mobilization organization, the team at Refugee 613 knew that traditional means of communicating information (websites, brochures) often don't reach those most in need, which pushed us to explore new and better ways of sharing information.

The DMSI project is an exploration of new ways to connect with newcomers using inexpensive, popular digital messaging platforms. **The core principle of this project is to 'go where the audience is' to reach community members in places where they are already communicating and sharing information.**

The success of this project is due to the effort of many people all across the country. In particular, we would like thank our colleagues who lead the efforts in the four pilot sites: CSC Vanier, Calgary Centre for Newcomers, Immigrant Services Association of Nova Scotia (ISANS), and North Bay & District Multicultural Centre.

We would also like to thank consultant **Marco Campana** for his work in laying the research foundation for the project and providing strategic advice at many points, and PeaceGeeks for their role in helping us develop and facilitate co-design sessions and providing expert insights.

This project would not have been possible without the generous financial support of Immigration, Refugees, and Citizenship Canada (IRCC). Indeed, the goal of the DMSI project is to provide IRCC staff and sector partners with useful, practical insights for the use of digital messaging, and this toolkit is a significant contribution to that

goal. Thanks in particular to staff on the IRCC Innovation team, past and present, and to our program officers for believing in this concept and supporting us throughout.

Finally, such a complex and multi-faceted project would not have happened without dedicated, creative and committed staff. Thank you to the Refugee 613 team members who contributed to the project since it began. Thanks also to consultants Margery Leach and Deborah Leach, who helped us synthesize all our learning into this toolkit and graphic designer Christina Muxlow, who made it come alive on the page.

We hope this toolkit gives you the information and guidance to set up your own digital communities to support newcomers making their homes in new communities. We would love to hear from you, whether you've been running a digital messaging network for years or are just getting started. Please send your feedback, ideas and observations from your own work to us at info@refugee613.ca.

Louisa Taylor

Director of Refugee 613



Contents

Acknowledgements	2
Introduction.....	5
About this Toolkit.....	6
Why We Developed It	7
Who Should Use It	8
How we got here.....	9
How Digital Messaging Can Support Settlement and Integration	10
A Quick Look at What’s Inside	11
Key Practices for Digital Messaging Success.....	12
Key Practices for a Successful Digital Messaging Service	13
Practice #1: Understand and Plan	14
Practice #2: Clarify, Communicate and Coordinate	15
Practice #3: Assess and Adapt	16
Steps for Running a Digital Messaging Service	17
Getting Started	18
Preparing to Launch	26

Launching and Running.....	32
Evaluating Results	37
Real-World Examples.....	38
Real World Example #1 Know Your Audience	39
Real World Example #2 Complement Other Forms of Support (Don't Replace Them)	40
Real World Example #3 Make Participant Experience a Top Priority	41
Appendix	42
Appendix 1 – Terms Used in this Toolkit (What We Mean When We Say...).....	43
Appendix 2 – Usage Statistics - Template and Example	47
Appendix 3 – Examples of Community Guidelines	49
Appendix 4 – Resources for Defining and Measuring Results.....	53
Appendix 5 – DMSI Information Sheet.....	58

CHAPTER 1

Introduction

CHAPTER 1.0

About this Toolkit

This toolkit provides information about how to use digital messaging to help newcomers settle a new country. Our work has taken in place in Canada, but many of these lessons learned are applicable anywhere that immigrants are arriving.

When we talk about digital messaging, we mean using apps like WhatsApp, Facebook, Slack, WeChat and SMS or text messaging. Easy to use and usually with no fees, these can be powerful tools for creating communities and delivering services. They can make it possible to bring together people who have things in common, like their home country, their new

city, their work, sports or social life. Digital messaging tools can connect people who are new to the country with other people who understand what they are going through, and what support is available. With digital messaging, information can be shared quickly and easily to connect people to support they need as they move through stages of integration. It can also be useful to people and organizations who support newcomers to collaborate with one another or deliver their services in innovative ways. The toolkit has tools and tips for effectively using **digital messaging for settlement and integration**.

When we refer to digital messaging for settlement and integration, we mean things like creating a digital messaging service for supporting and sharing information with newcomers or partners either as a group or one on one.

IN THIS TOOLKIT, YOU WILL FIND INFORMATION ON:

- How digital messaging can support newcomers
- Tips for using digital messaging successfully
- Stages and steps to follow, including selecting your platform, guidelines for organizing and running a digital messaging service, and evaluating how well it is working
- Real-world examples of digital messaging in settlement and integration

This toolkit also provides sample checklists, policies, guidelines and tools that can help you set up and run your service with confidence.



When we use the words platform, tool or app, we are talking about services like WhatsApp, Facebook, WeChat, Telegram and text messaging that people use on their mobile phones.

CHAPTER 1.1

Why We Developed It

Canada has a strong network of support for newcomers, most of it delivered through civil society organizations. This rich diversity of services is a strength of our immigration system, but it can be hard to know where to go and how to get the right information at the right time.

Refugee 613 tested, researched and evaluated a number of ways that digital messaging can help close the information gaps. We have found digital

messaging useful for supporting newcomer communities, without spending a lot of money and time, and with good results. It is not the only solution, nor does it make sense for addressing every communications challenge, but it is a powerful tool that could be used to much greater impact. We believe that, used properly, digital messaging can greatly increase the independence of new arrivals and help them navigate their own way to a better settlement experience.

CHAPTER 1.2

Who Should Use It

This toolkit can be useful to anyone who supports newcomers and to newcomers themselves – whether they have been in their new country for a few days or several years, no matter where they came from or why they left.

We developed the toolkit for:

PEOPLE OR ORGANIZATIONS WHO
PROVIDE SERVICES TO NEWCOMERS

NEWCOMERS WHO ARE LEADERS OR
VOLUNTEERS IN THEIR OWN COMMUNITIES

VOLUNTEERS WHO SUPPORT NEWCOMERS,
SUCH AS PRIVATE SPONSORS OF REFUGEES

CHAPTER 1.3

How we got here

Refugee 613 ran a successful digital messaging group called Refugee 613 Welcomes You to Ottawa since 2017. Originally on WhatsApp and now on Telegram, this group is now moderated by volunteers and serves 320 people in Ottawa. It provides trusted information and referrals about settlement services and support information in Arabic, Monday to Friday, from 9 am to 5 pm. Refugee 613 built on the success of that group in 2018, and with financial investment from the Department of Immigration, Refugees and Citizenship Canada, launched a national project to explore other ways of

using digital messaging to build more welcoming communities. The DMSI (Digital Messaging for Settlement and Integration) project has produced research about how digital messaging is already being used in Canada to support newcomers, an evaluation of our WhatsApp group, and four new pilots so we could understand and share with others the full power of digital messaging for different purposes in newcomer settlement and integration.

We produced this toolkit to share what we've learned and help others create successful services.

An illustration on a teal background. A hand is holding a black smartphone. The screen shows two message bubbles: a white one at the top and a blue one at the bottom, both with a yellow circular icon containing a '63'. Above the phone, a white speech bubble contains the text 'Refugee 613 Welcomes You to Ottawa!'. To the right of the speech bubble are two small heart icons, one blue and one white.

Refugee 613
Welcomes
You to Ottawa!

CHAPTER 1.4

How Digital Messaging Can Support Settlement and Integration

DIGITAL MESSAGING CAN BE USEFUL IN MANY CONTEXTS FOR A VARIETY OF AUDIENCES:

- **Newcomers** (refugees, economic immigrants and other newcomers) – to help connect with others from the same country, to share information about activities of interest, and to receive important settlement information.
- **Settlement, health, housing, employment and other social services** (frontline staff, management and leaders of organizations that support the settlement and integration of refugees, immigrants and other newcomers) – to provide information, referrals and hands-on services for newcomers. And, it is particularly helpful for reaching people in rural communities where distances to services can be long and people may experience greater social isolation than in more densely populated areas.
- **Volunteers** (community volunteers, including refugee sponsors, who support newcomers formally or informally) – to connect volunteers to the newcomers and to the organizations they are supporting, to connect experienced refugee sponsors with new sponsors to share useful resources and learning.

CHAPTER 2.0

A Quick Look at What's Inside

You may want to read the whole toolkit or click on a link below to see information on a particular topic. Here is how the toolkit is organized:

- In [Section 3](#), you'll find information on key practices for using digital messaging to provide a service.
- [Section 4](#) outlines the stages and steps to set up a digital messaging service.
- [Section 5](#) is called *Real-World Examples* and shares how some others have used digital messaging to support newcomers, so you can learn from their experiences.
- The [appendices](#) provide definitions of terms, templates you can use, and links to other resources and information.

Q: What is digital messaging?

A: It's the use of electronic tools like WhatsApp, Facebook, Telegram and text messaging to connect and share information with people who have similar needs, interests, problems to solve, or services to deliver or coordinate.

CHAPTER 3

Key Practices for Digital Messaging Success

This section introduces three key practices to guide the design and implementation of your digital messaging service:

- Understand and plan
- Communicate and coordinate
 - Assess and adapt

Q: What makes digital messaging a useful tool for settlement and integration?

A: Most importantly, digital messaging is already one of the most popular and convenient ways that newcomers get their information and stay connected. It's usually free, easy to use and popular with friends and family back home as well as in their new country. By tapping into this popularity, you can reach more people, more effectively than by email (which is not popular among recently arrived newcomers), at lower cost than traditional advertising, and at greater convenience to them. It makes for an excellent method of reinforcing communication delivered in other ways, such as word of mouth, printed material or news media.

If you're not making thoughtful use of digital messaging to reach newcomer audiences, you may be overlooking one of the most effective communications channels available and missing an opportunity to ensure access to information is truly inclusive.

CHAPTER 3.1

Key Practices for a Successful Digital Messaging Service

The technical side of setting up a digital messaging service is easy: pick a platform, create an account, give your service a name, invite people to join and start sharing information. And it's true that digital messaging overall is a relatively simple tool for offering service — but if you move forward without establishing some crucial practices from the beginning, you are at high risk of failure.

In the next chapter, we present the steps for designing, launching and implementing a digital messaging service for newcomers. It's a lot of thoughtful and practical advice that we sum up as three key practices to apply to providing your service.

Practice #1: Understand and Plan

Know Your Purpose: Take the time to do some research to challenge your assumptions and confirm your goals.

Understand Your Audience: Understanding who you want to reach is essential. You've already confirmed that there's a need, but knowing the communications practices and preferences of potential members is very crucial.

Pick a platform that fits your community: Your choice of digital messaging platform should be based on the purpose of the group, your audience members' digital habits and what they're comfortable with and use, as well as privacy and information accuracy requirements.

Have the right resources and systems in place: There's a myth that because it seems less formal and serious, digital messaging services are not very time-consuming to run. This is not only wrong, it could lead to setting up a service that you or your organization can't sustain, and you end up disappointing your audience and eroding their trust in you. Running an effective interactive digital messaging service requires a clear workflow, dedicated time and some basic equipment.

Have people with the right skills and experience: Having a skilled person or people dedicated to designing and running the service will give participants a consistent experience, help them know what to expect, and keep them satisfied and interested. Your moderator — whether volunteer or professional — sets the tone for what happens in the group and helps make it a good experience.



Moderating A Digital Group

The moderator makes sure the rules of engagement are followed, provides clear guidance about what is suitable to discuss in the group and manages response times. The moderator also “seeds” activity, for example, by posting information or asking questions when activity appears to be slowing. These elements help to maintain momentum, ensure the integrity of the information and communications, help ensure participant satisfaction, and help solidify the positive reputation.

“The Digital Community moderator should take care of the members, be smart to notice their needs, and be flexible regarding the members postings and personal situations. At the same time, the moderator needs to know when to say NO in a good way that the member can respect, so members follow the guidelines. It can be a challenge, but the moderator needs to be firm in a way that doesn’t let members cross the line but also doesn’t make them hate being in the group or give them the feeling that they are in school. When there is a conflict, the moderator needs to know when to speak up, how to listen to all sides, and what to say in a way that doesn’t turn the problem into a personal issue.”

– Lama

Digital Community Manager

Practice #2: Clarify, Communicate and Coordinate

Clarify scope and processes: Confirming and communicating the scope of your digital messaging community – its purpose, target audience, what topics are in and out, guidelines for behaviour – will help people decide whether it’s right for them, and people who do join will know what to expect.

Communicate community guidelines: Communicating and consistently applying community guidelines (“rules of engagement”) will help people feel safe and comfortable. These guidelines include things like: the purpose of the group; privacy and safety; offensive content – what it is and how it will be dealt with; advertising – is it allowed; response times; what is suitable to discuss; and anything else that may be unique to or important about participating in your group. Samples of community guidelines are available at the end of the toolkit.

Coordinate with partners: Coordinating with organizations that are relevant to your group’s needs will make sure they know who you are, build your profile with people they serve, help get the word out, and help you access the support and information your digital messaging community needs. It can also help you avoid adding duplication to an already complex sector.

“The PIFI project worked really well to reach Francophone newcomers from here (Ottawa) and overseas. People were engaged and were hungry for information. They asked lots of questions and since they were satisfied and happy with their experience in the group, they shared the group with their friends and family. As much as there were really great things about the group and digital messaging, some small roadblocks or difficulties arose. Since the group was very active, it was sometimes difficult to publish interesting and important content as well as answer many, and sometimes complex, questions. We became victim of our own success! At the end of the pilot project, we had over 700 people in the group after 9 months. I can only imagine how the workload would increase tremendously with the number of members climbing. I would suggest having more than one person running the group to keep up with publishing content and answering questions. Besides that, just make sure your members are engaged and active on the page by publishing interesting content that is important to them and having conversation starters periodically. The key is to know your audience, which will help keep the group alive and flourishing.”

– Vicki

Settlement Worker

Practice #3: Assess and Adapt

Monitor and Evaluate: Develop indicators to help you monitor what’s working and what’s not. Listen to your audience and partners. Stay up to date with any technical developments with the platform, to incorporate new features or, if necessary, plan to migrate to a new platform.

Refine and Evolve: Feed the information you get from your audience and partners into your design. Be willing to adapt and evolve over time — flexibility is one of the most attractive features of digital messaging services.



CHAPTER 4

Steps for Running a Digital Messaging Service

We've grouped the steps for establishing and running a digital messaging service into four major stages:

Stage 1: Getting Started

- Define your purpose
- Understand your audience
- Select platform

Stage 2: Preparing to Launch

- Generate buy-in
- Secure resources
- Develop policies, guidelines and protocols
- Provide training
- Make an evaluation plan

Stage 3: Launching and Running

- Add participants
- Promote
- Moderate
- Track and monitor
- Remove participants

Stage 4: Evaluating and Improving

- Implement your evaluation plan
- Use the results to strengthen the service

CHAPTER 4.1

Getting Started

Before deciding to set up your digital messaging service, it's important to be clear about why you want to use digital messaging and whether it's suitable for your purpose. It's essential to do this work to understand and plan before selecting your platform.

DEFINE YOUR PURPOSE

The most important step in getting started is making sure you are clear about your purpose – specifically, the community you want to serve, and what goal you are trying to achieve. We strongly recommend taking the time to write down your rationale, for your own purpose but also to share with potential partners or funders. Answer such questions as:

- Who do you want to help and why?
- What is the information or service gap you are trying to fill?
- How do you know this is a gap? Do you have evidence to support your analysis?
- Is anyone else doing it already?
- Why do you think digital messaging is a good way to address it, and have you considered other tools or approaches?
- Do you want to provide one-way communication, for example sharing job postings, health information, etc., or foster a discussion space where everyone can share and comment?

- How do you know you are best placed to do it? Are there other organizations you should partner with?
- Is yours the best approach from the user's perspective, or are you creating more challenges than you are solving?

Asking yourself these questions before making any plans will increase your chances of success. It will also reduce the potential for duplicating digital services. Newcomers don't want to have to join five different apps or groups offering the same service. Seek out partners and collaborate as much as possible, right from the earliest stages. For example, instead of each settlement agency in your community creating an information service for newcomers, work together to create one service that newcomers can join and receive information from all providers in one channel. Not only would it likely be more cost-effective, it is far better for the audience and helps to overcome the sector challenge of system navigation.

If you're working within an organization, then you will need to document your rationale as a normal part of business. But even if you are doing this as a volunteer to serve a community, writing it down will help you plan better, make the right choices and stay on track.

UNDERSTAND YOUR AUDIENCE

You have probably decided to start your digital messaging community based on a well-established need. In that case, you have a good idea of how to help. You also may be part of — or already know a lot about — the newcomer group you aim to serve, including their culture, languages and settlement challenges.

But it's essential that you don't design your service based on your own assumptions. Go beyond what you already know, to ask about the information practices and preferences of the people you want to reach, and how they define their needs. Sometimes, you don't know what you don't know!

This learning is best done by including people in your target community ("audience") and the organizations that serve them in the design process. Here are some useful techniques:

- Include audience members in an advisory committee
- Conduct surveys in person, by phone or online
- Hold focus groups
- Have one-on-one conversations with target audience members
- Participate in and monitor other online groups or services that serve the same community

Information you may wish to gather from potential participants includes:

- Which digital messaging apps they are comfortable with and which they most prefer
- What kinds of things they would like the service to focus on, or that they are having the most trouble with (e.g., settlement system navigation, community building, community activities)
- What concerns they have about confidentiality, privacy and the experience of being in a digital group
- Their preferred language
- Which device they are most likely to use – mobile, smartphone, tablet, laptop.

Don't move forward until you are confident you understand your audience. *Refugee 613 Welcomes You to Ottawa* has been very successful at connecting Arabic-speaking refugees to important resources that can help them manage their life in Ottawa because:

- We took time before launching to confirm the need, understand the audience and design the service
- We chose an app that was already popular with users
- We provide the service in the language they use the most
- We incorporate audience feedback in daily operations

Table 2 - Getting Started Checklist

Before moving to the next step, use this checklist to confirm you have all the information you need, and use it to document your design process.

Statement	Yes	No	Not Sure? (get more information)	Explanation/ Details
I have a clear purpose for using digital messaging, based on the needs of the community/target group to be served. We are planning to use digital messaging for one or more of the following reasons that will improve the experience of newcomers: <ul style="list-style-type: none">• information exchange• service/system navigation• community building• reducing social isolation• other				
The target group for the service has been clearly defined and we know there is interest in a digital messaging group				
I have gathered information on the digital messaging experience and preferences of the target communities (for example, I know about preferences for certain apps)				

This will be a useful record for when you set up and run the service. **If the answer is 'No' or 'Not Sure' to any of the above, pause your implementation to get the answers you need.**

It is always useful and or if you are an organization, a funder may require it to document the purpose and intended results of your digital messaging community in a project rationale or logic model. Later you can use this information to help you measure and evaluate the results you achieve ([Appendix provides examples](#)).

PICK YOUR PLATFORM

There is no single correct answer to the question: “Which tool is best for delivering digital messaging services?” What’s important is to figure out which one suits *your* audience and purpose.

First, confirm which apps are already used by your target audience. Selecting an app already popular with them will increase the chances that people will try your service and that they will find it easy to use. They will not need to create a new username or password and they won’t have to learn a new platform. If there is one app they mostly use for similar things, use it and work within its limits. You may be tempted to pick one that seems better, for example, because it has more features and makes it easier for you, but forcing your audience to try something new is risky. Sometimes this works, but most of the time, it doesn’t.

Selecting a platform your audience uses will lead to quicker uptake and higher participation rates, making it more likely that your digital messaging service will be welcoming, relevant and useful.

Of course, there can be exceptions to this rule – sometimes, people just need a reason to try a new app! – but in general, picking an app your audience already uses is a good practice to follow.

If your audience uses different apps and it’s not clear which one to pick, do a little more research and ask what they prefer for the purpose you’re proposing, and why.

LET’S CONFIRM: IS DIGITAL MESSAGING REALLY THE ANSWER FOR YOU?

If you’re using this toolkit and you’ve read this far, then you’ve probably already decided that digital messaging will serve your purpose. But it’s worth challenging that assumption before you commit time and resources. Would you have more impact if you shared information through meetings and word of mouth? Would it be more efficient to disseminate your information in an existing digital service run by another organization, rather than starting your own? Your audience may be grateful to not be asked to join yet another service! If you simply want to share general information about you or your organization, then a website may be all you need. Choose digital messaging if you need to reach a large audience quickly with less effort, or if you need a convenient and adaptable tool to have ongoing communication with your audience.

EXAMPLES OF DIGITAL MESSAGING PLATFORMS

Technology changes quickly. There are many digital messaging platforms available and existing platforms change and update their features all the time. A platform that focuses on a specific purpose or set of features today may be replaced by something else tomorrow, and one that doesn't offer certain features now may soon add them based on user feedback. Here are some examples that are commonly used at the time of writing this toolkit:

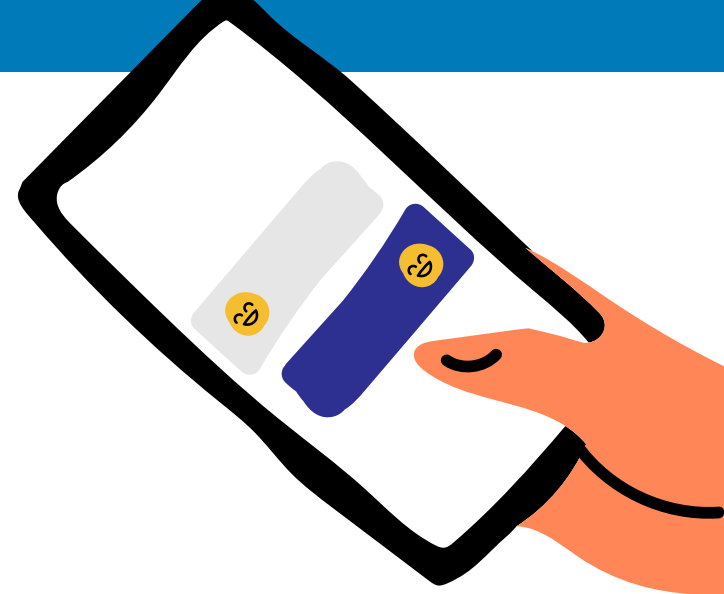


Table 3: Some Commonly Used Digital Messaging Tools



WhatsApp: Uses a phone's Internet connection to send messages without fees. Group chats allow for sharing messages, photos, and videos with up to 256 people at once. Now owned by Facebook and subject to their data-sharing protocols, adding to privacy concerns.



Slack: A collaboration hub, used most often for people to work together on shared tasks or topics. Conversations happen in channels that can be organized e.g. by topic, project, or sub-group. It integrates with other apps and services.



Facebook: A social media forum for sharing experiences via text, photos and multimedia. It includes a feature for setting up common-interest groups. [Facebook Messenger](#) or "Messenger" allows for free messaging across devices.



WeChat: A Chinese messaging, social media and mobile payment app. It provides text messaging, hold-to-talk voice messaging, one-to-many messaging, video calls and conferencing, video games, and photograph and video sharing.



Telegram: A messaging app similar to WhatsApp, it states it focuses on speed and security, and that it is super-fast, simple and free. Messages sync seamlessly across any number of phones, tablets or computers.



SMS: Short Message Service, commonly known as texting, is the oldest of these platforms and provides the best access, because almost everyone can receive texts, but it also has the fewest extra features.

*** Note:** This list isn't intended to promote these apps, or promote one over the other. It also isn't a complete listing of the possible platforms, or all the features of each platform listed. Since the features – including any limitations and security and

privacy functions – are frequently updated, we've included links to their websites where you can locate the most current information.



The platform selection checklist in [Table 4](#) can help you decide.

By rating requirements on a scale of “Not important” to “Very important”, you’ll get a better idea of what functions you need. Then you can look into each app, especially to learn about how they match up with the features that are most important to you. You can check their websites, talk to people who’ve had experience with various apps, read user reviews, and check online forums that compare apps. **Most of all, talk to your intended audience!**

Even if you already know that there is one platform that suits your target group best, it’s still helpful to go through the checklist and think through your options. It can help you to confirm what you need to offer, and how you can use the app’s features to meet the needs. It can also help identify what the app is best for and not as suited to – then you can adjust your plan to fit the app’s strengths, and set expectations with your participants.

Recently, members of *Refugee 613 Welcomes You To Ottawa* told us that more and more of them were using Telegram and asked us to consider switching from WhatsApp to Telegram. Migrating to a new platform is a risky move – you will inevitably lose some of your audience. But the request came from the group, and we liked the features Telegram had to offer, so we made the move. The majority of members moved with us, and the group continues to grow.

Table 4 – Platform Selection Checklist

For each factor below, check off its level of importance to your specific purpose (not important, somewhat important, or very important)

Factor	Not Important: <i>The factors in this column do not need to be addressed. An option that only addresses these considerations is probably not the right one.</i>	Somewhat Important: <i>The factors in this column can help you decide between two options that meet most of the “Very Important” criteria in the next column.</i>	Very Important: <i>The factors in this column become top selection criteria. If an option addresses most of these, it should be a top choice.</i>
The app is used a lot by the target audience.			
Confidentiality, security and privacy are big concerns.			
I need to be able check the accuracy of information shared by others and correct or remove it if necessary.			
I need to be able to moderate the group.			
I need to be able to have X (number of) users online at the same time.			
It needs to allow public and private messaging.			
A lot of my participants don’t have a smartphone, laptop or tablet, so it needs to work with regular mobiles and/or landlines.			
It needs to be accessible to people with limited text or data plans.			
It needs to support video communications (even if all members won’t use this).			
It needs to support any language, or a specific language that my target audience uses.			
I need to be able to set up a way to bring on new members and help them get oriented.			
Users can easily be removed from the group if they do not follow guidelines, or no longer wish to participate.			
It allows me to collect usage data that can help me improve the service or report my results (e.g. to a funder).			
It allows me to easily store information for future reference.			
Add other considerations that are important to you.			

Remember: Although all of the items in the checklist that get a “Very Important” rating should be considered key criteria, the most important criterion is that your audience is already familiar with the platform.

Table 5 provides examples of digital messaging services that were tested as part of the DMSI project. The table isn't meant to recommend specific apps for similar services, but to show some ways that digital messaging services were used. Each of these examples had varying results. [The Real-World Examples section](#) provides more detailed case studies of a few of them, and some key lessons learned.

Table 5 – Examples of Digital Messaging Services Tested in the DMSI Project

Organization/Group	What it is	Platform
Immigrant Services Association of Nova Scotia (ISANS) Project Beacon	A peer workspace where sponsors get support in a safe, moderated digital environment. Sponsors connect with other sponsors to solve problems, access more resources, ask advice from ISANS staff, discuss successes and challenges of their sponsorship experience, and peer mentor one another.	Slack
Centre for Newcomers (CFN)	Supports case management for Arabic-speaking newcomers to Calgary. An Arabic-speaking settlement worker provides accurate, timely settlement-related information to clients.	WhatsApp
North Bay District Multicultural Centre	A group for newcomers to Northern Ontario communities, focused on reducing social isolation especially in remote and rural locations. Members of this online community can learn about upcoming events and regional services, and ask questions to other newcomers.	Facebook
Portail d'intégration franco-immigrant (PIFI)	A closed, moderated Facebook group for francophone newcomers to Ottawa, established by 5 community organizations. Members can ask any question and get answers within 48 hours on business days.	Facebook
Refugee 613 Welcomes you to Ottawa	A moderated group where Arabic-speaking newcomers can seek information about settlement services for refugees in Ottawa, and get a trusted response within 24 hours.	Telegram
Ottawa refugee sponsorship groups	A forum for Ottawa-based private refugee sponsors and supporting organizations to work together and share information, resources, and advice.	Facebook

CHAPTER 4.2

Preparing to Launch

This section outlines how to move from planning to launching your digital messaging service.

- ☐ Get commitment
- ☐ Get the right resources
- ☐ Develop policies, guidelines and protocols
- ☐ Deliver training
- ☐ Make an evaluation plan

GET COMMITMENT

Commitment is important for building a useful service that will last. If you are creating this service as a volunteer, you need to make sure that you can commit the time and effort needed to sustain it on a daily basis. If you are doing it as part of an organization, you need your supervisor, colleagues, volunteers, partners and funders to recognize more than the benefits of a digital messaging service; they need to understand what it takes to run one, and commit to making it happen. This commitment will:

- Increase the likelihood of getting the resources you need – staff, volunteers, space, equipment, supplies, promotional support
- Allow you to better promote the service and build trust with partners and potential participants
- Help to more easily form connections with events and services that are relevant to participants
- Help people in your organization or community be supportive and understanding as you test, learn from the experience and improve over time



Here are some ways that can help build commitment:

- **Describe:** Write a brief description of the service you're planning and include things like:
 - The need you will meet by creating the digital messaging service.
 - How you identified the need.
 - Any research that shows that digital messaging is a good way to meet the need.
 - The fit between your mission and the service you are considering. If you are an individual, this could be a description of why you want to do it, and why you are the right person to do it (for example, your connection with the community, your knowledge of a specific subject, previous relevant experience).
- **Engage:**
 - If you're doing this in an organization, as part of the initial "understanding" stage, consult with staff and partners about the aspirations and concerns they have about your digital messaging community (and use the information you documented above!). Staff may be concerned that they will be asked to take on new roles on top of their existing work. Partners may worry that you are overlapping with services they offer. Seek their advice on how to address these concerns. Stakeholders may also be looking for new ways to connect with their communities – engaging them can create an opportunity to work together on the digital messaging project.
 - If you're doing it as an individual and are not part of an organization, talk to people in your community about what you're planning. Also, talk to organizations that may be interested – those whose missions are relevant to the service you're offering. They could have useful ideas, connections with potential participants, and a network of people and organizations that may be helpful. They may be willing to help you get the word out, too.
- **Acknowledge and Reflect:**
 - Adapt your plans to address concerns and recommendations offered by potential users, staff and partners. This demonstrates that they have been heard and almost always makes your service stronger. People are usually more willing to support an initiative when they see it is worth contributing to its development.

GET THE RIGHT RESOURCES

If you're an individual voluntarily setting up a service, the main resources you will need are time, space, a smartphone, a laptop, and potentially someone you trust to help out or fill in for you sometimes. Be especially realistic about how much time you will need to operate the service in the way you intend to run it. If you under-estimate, you may end up too exhausted to keep up a good service, disappointing your audience and making it harder to win them back later.

If you're in an organization, resources could include volunteers, staff, funding, equipment, space, and the funds* that will pay for them. Again, be realistic: if you estimate "on the low side", you may get approval to go ahead, but face the risk of your digital messaging not succeeding or lasting. Typical resources an organization should plan for include:

- A **staff** position (or positions) with responsibilities for developing, managing, moderating, monitoring, updating and reporting on the project activities. The amount of time that needs to be dedicated to the service will depend on its scope and the number of participants. The most important thing is to have a good understanding of how much time the role will take. If the people assigned have other responsibilities, be clear about the proportion that will be dedicated to digital messaging.
- **Time and resources** to provide support and supervision to the staff member managing the digital messaging community, as well as for technical support.

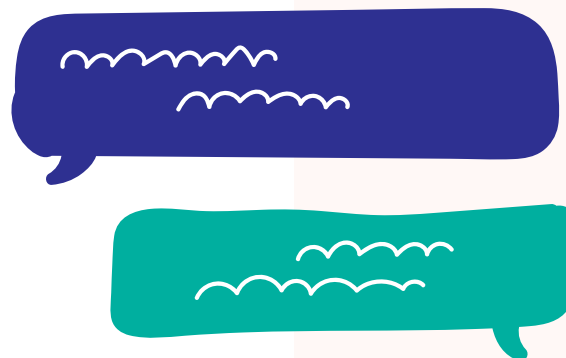
- **Funding** for monitoring and evaluating – this would include developing feedback tools like user surveys and periodic, independent evaluations to help improve the program and demonstrate success for future funding.
- **Equipment** such as a computer for the person who is moderating the group, and a smartphone.
- **Space** this is something that is often overlooked when planning a new project, service or program. It's good to have the space ready before starting-up – including necessary furniture and equipment, and privacy requirements.

***Note:** It is ideal to have ongoing funding (funding that will continue year after year) or multi-year funding rather than one-time project-based funding. This can increase stability of staffing, service consistency and sustainability, and ultimately the quality of the digital messaging experience. However, it may be challenging to find ongoing funding. Sometimes opportunities come up unexpectedly, so it's good to stay on top of funding sources and maintain service data that you can use to build a convincing case in your funding applications.

Here are some other tips on seeking funding:

- Consult with others about the kinds of resources they had – and wish they had – to set up and sustain the digital messaging service
- Make sure you don't underestimate the resources you need
- Consider government (federal, provincial /territorial and municipal), foundation and other non-government funding sources such as the local United Way and Community Foundation
- Build a business case for funders and include information provided in the [Generate Commitment](#) section.
- Look into innovative ways to generate funds, for example through your digital messaging platform*.

* We don't recommend charging user fees, but there may be other ways to generate revenue that you can use to develop and sustain your digital messaging, including sponsorships.



DEVELOP POLICIES, PROTOCOLS AND GUIDELINES

Policies, protocols and guidelines are written documents reflecting your group's rules and principles. They provide valuable information to those running the group and to members.

Some policies, protocols and guidelines may be for internal use and don't need to be shared with participants, while others are shared on a regular basis with members as a reminder.

- **Policies** are your position on topics related to your service.

Policies can cover things like:

- Membership requirements (who is eligible to be in the group or receive the service)
- Confidentiality and privacy, including when private messaging between the moderator and a participant should be used instead of public comments
- Service standards, for example how long it will take to get a response to a question
- Reasons why a participant would be removed (e.g. what behaviours are not acceptable)
- Internal requirements, like whether and when you will conduct evaluations of the service, what usage data you will track, and whether and how often you will conduct user surveys and for what purposes

- **Protocols** spell out procedures to be followed in specific situations. Protocols could include things like:

- The procedures to follow for accepting and removing participants
- Steps to follow when there is conflict between group members or between the moderator and a user
- What to do when participants don't follow the posting guidelines

- Protocols related to the user experience, such as:
 - how users will find the platform (Is it searchable online or will they be referred by others?)
 - what will happen when they join the group (e.g. Do they need to agree to community guidelines before getting access, and how does this work?).

- **Guidelines** explain more about the digital messaging and good practices to follow, like:

- The purpose of the group
- The role of the moderator
- What can and cannot be discussed
- What it means to build a respectful environment and what is unacceptable behaviour (things like racist, xenophobic, sexist, ableist, homophobic and transphobic remarks; bullying; sexual harassment)

Having and actively using policies, protocols and guidelines helps you provide consistent service and makes it easier for participants and the moderator to understand how to participate and contribute effectively. It reduces stress, because the standards of behaviour are clear to all. Some service providers fear they will scare off potential members by having too many rules, but we have found the opposite to be true: users appreciate an online space where the rules are both clear and enforced.

If possible, involve your audience in developing the guidelines and use positive and inviting language in the text. This helps users understand that the guidelines are intended to help make the experience positive, and not to control or police them.

DELIVER TRAINING

Training in this context refers to helping you and anyone else helping to run the group how to use digital messaging to support settlement and integration. It does not mean training users on how to use a digital messaging app itself – this information should be available on the app itself, and if it's not, definitely consider providing tips to users.

If you're delivering the service in an organization, the people who will set up and run it and those who supervise them should receive training. If you're doing it as a volunteer, you should still find out about and take advantage of available training tools and forums so that you can feel confident in your ability to deliver and maintain the service.

We've learned that training is most useful when it is:

- **Experiential, using real world examples.** The Design Sprint model used by Refugee 613 for its DMSI project is an example of an experiential learning model to help agencies understand how digital messaging platforms can be used to improve refugee settlement and integration. The 1 or 2-day training, developed in collaboration with the Vancouver, BC-based tech non-profit, PeaceGeeks, helps settlement agencies design and test an innovative idea within a short time span, so they can quickly learn from results, how digital messaging tools can be used to strengthen successful settlement and integration. Regardless of how you provide the pre-launch training, it's crucial to include several

different staff roles in the design process to build buy-in across the organization. It's also essential to design the back-end systems you'll need, by defining the scope and roles of relevant staff members, new workflow processes, internal communications and, where relevant, client referrals from the digital service to the rest of the organization. This design and training approach can also confirm what organizational priorities, principles and branding need to be reflected in the service. Details can be found in the [Appendix](#).

- **Periodic, not just once.** Additional, shorter forms of training should be offered on a regular basis, for example twice a year, to help keep up with trends and build on lessons learned. It may also be needed to help with specific things, like if you want to change your service, what to do when the number of participants grows significantly, or when there is change in staff and volunteers.
 - Keep an eye out for online and in-person events that discuss relevant topics, and participate in the ones that seem relevant to your (or your colleagues') needs.
- **Tailored to the specific roles.** Training topics should touch on many of the items covered in this toolkit, but to varying degrees, depending on the roles of those being trained. Some relevant topic areas and the roles they are suited to include:
 - The benefits and uses of digital messaging in settlement and integration – for executives, board members, managers, and other staff
 - Confidentiality, privacy and data access – for managers and moderators

- Setting and maintaining appropriate client-service provider boundaries in a digital messaging relationship – for moderators and managers
- Policies and guidelines – for managers and moderators
- Steps, resourcing and ongoing operations – for managers, other leaders and moderators and other staff

DEVELOP A MONITORING & EVALUATION PLAN

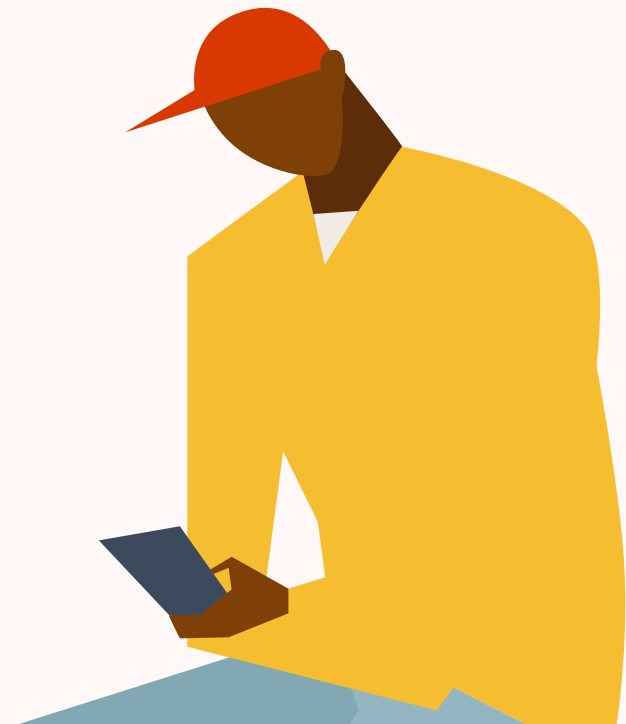
When we speak about evaluation in this context, we're talking about taking time to assess the design, implementation and results of the service after it's been up and running for a while, to help learn and make decisions.

Organizations are often required to evaluate programs they deliver, for example to meet funding requirements, and this may be the case if you are delivering a digital messaging within an organization. But it's not just for organizations: evaluating is good for anyone running digital messaging, and it doesn't have to be complicated. It is a way to check if your service is set-up well, if it's meeting its intended purpose, if it's having other benefits, and what you could change to make it better.

Make an evaluation plan before you launch that spells out:

- ☐ The purpose of your digital messaging community and results you want it to achieve
- ☐ The reasons you are evaluating
- ☐ When and how often you will evaluate
- ☐ The main questions you want to answer
- ☐ How you will get the information to answer the questions

[Appendix](#) has links and examples to help you make the plan and implement it.



CHAPTER 4.3

Launching and Running

Key elements involved in launching and running a digital messaging service include:

- Adding participants
- Promotion
- Moderating
- Tracking and monitoring
- Evolving and adjusting
- Removing participants

ADDING PARTICIPANTS

You'll need a simple, clear process for recruiting and accepting participants and making sure that potential members:

- Understand the purpose and whether and how it serves their needs
- Fit the profile and needs of the target audience you are trying to reach and will benefit from joining
- Understand and agree to the rules of engagement ([community guidelines](#))
- Know how to join the messaging service and what steps they have to follow

To achieve this, you need:

- **A brief, clear description of the service**, including its purpose and target audience, which you can post in a number of places – within the service/platform itself, on your website if you have one, and in any promotional and awareness-raising materials you produce.
- **To use the platform's settings** to identify the users who can act as administrators of the service and have the authority to accept or onboard prospective participants.
- **A way for people to apply to join the service.** If it's a group and you are allowing participants to sign themselves up, you should include a few questions to confirm that an applicant is part of the target audience, and include the rules of participation for them to agree to before they submit their request to join. Your platform's set-up process should allow you to do this – keep it very brief.
- **A way to accept or deny a request to join the service.** You also should be able to set it up for the participant to be automatically notified if their request is accepted or not.
- **A standard welcome message that participants will receive when they are notified of being accepted** (most relevant for groups). This message should include steps to getting started, and link to the community guidelines that you have produced and that they previously accepted. Ensuring everyone receives a copy of the guidelines on acceptance will be very important later if you have to enforce any of the rules. Referring to the guidelines you sent at the beginning and have shared regularly as a reminder reinforces that you are following policies and any action to remove or restrict a user is not personal.

PROMOTING

Promoting is about getting the word out to your target audience. Here are some good practices:

- **Use tools built into the platform.** Use the promotional tools within your platform that will make it visible to potential participants who are already using the platform for other purposes.
- **Use what you have.** If you have a website, post information there and include the link to your digital messaging service. If you regularly distribute a newsletter or host other online or in-person activities, make sure to share information about your new service.
- **Share in other digital messaging channels.** Other Facebook, Telegram or WeChat groups serving the same audience can be great places for promotion. Reach out to the admins, tell them about your service — chances are they'll be happy to help you.
- **Traditional media.** Make posters, postcards or flyers that you can take to events, make available at your physical location if you have one, and leave in places where members of your target audience are likely to be.
- **Share with partners.** Let organizations and other people you collaborate with know about the digital messaging service, for example by distributing an email message. Give copies of your flyer or poster to community organizations and partners who have physical locations.
- **Copy and paste.** To save time and for consistency, use the same information everywhere you post it. If you have the capacity, develop a set of key messages (the main things you want to communicate) and adjust the text to suit different media. You may need to shorten or lengthen the message depending on where you're placing it.
- **Store everything.** Keep an electronic file folder of everything you produce so that you can refer to it easily, re-use and share. If you're in an organization or if you co-host your digital community with others, make sure the folder is easily accessible by your colleagues (e.g. as a Google Drive folder or other shared folder).

MODERATING

Moderating a digital messaging service is the most important job. The right moderator will make a big difference to the success of the service. The job of the moderator is to:

- Have or share the technical administrator role for the platform and settings, so that they can ensure the settings are correct and make changes when needed, including onboarding and offboarding members.
- Keep track of all the traffic in the community and:
 - Make sure that service standards are met
 - Follow up on, answer, or connect with partners to answer questions (make sure questions are answered even ones they can't answer themselves)
 - Make sure the rules of engagement are followed – such as respectful language, relevance of the discussions to the purpose of the group – and step in when necessary, which may include removing a participant from the group.
 - Refer participants to relevant resources, like websites or partner organizations
 - Maintain and update FAQs based on common themes, if you have them
 - Post useful information, like updates to government policies and programs, newcomer services in the community, relevant upcoming events
 - Administer user satisfaction surveys from time to time
 - Post questions or discussion topics to help keep the community engaged

The extent to which a moderator performs these tasks will depend on the amount of time that is dedicated to the role. If the moderator is doing other work within an organization or is a volunteer, this will affect how much time can be spent moderating. Service standards and community guidelines need to clearly communicate and reflect the level of moderation that's possible in your context.

There is often a direct relationship between how much time the moderator spends actively engaging in the service and how successful the service is. However it is also true that no amount of moderator activity can overcome poor platform choice or lack of interest from the user group.



TRACKING AND MONITORING

It is useful to collect usage statistics, such as the number of participants, and level of activity, and to track this over time. This information can be useful for:

- **Identifying** any trends or changes in participation that you may need to address to keep the group as relevant as possible. Are people dropping out? Has the level of engagement increased or decreased, and why?
- **Knowing** the service's busiest and most active times, so that you can plan the work effectively and efficiently

- **Reporting** and communicating about the service, for example to a funder or a board of directors
- **Contributing** information to an evaluation of your service

Most platforms should have a way of tracking and providing you with reports on usage, also known as analytics. It's a good practice to regularly collect and transfer this information into your own spreadsheet, so that you can have it handy to use for a range of potential purposes. Build this step of tracking into your workflow – we recommend once per month. It is so much easier to do it regularly than to go back at the end of a year or more to collect these statistics!

Here is an example of usage data that we captured about the *Refugee 613 Welcomes You To Ottawa* digital messaging group in its first year:

Table 6 – Example of usage data

	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Total
Inquiries	23	32	22	14	15	23	21	24	21	22	23	39	279
Information	10	10	13	9	7	11	12	20	13	15	11	38	169
Referrals	27	38	18	6	8	19	199	37	14	8	16	11	221
Posts	42	39	47	39	30	35	29	58	28	29	47	35	458
Total	102	119	100	68	60	88	81	139	76	74	97	123	1127

Source: *Refugee 613 Welcomes you to Ottawa* - WhatsApp statistics

User surveys and focus groups add important value to the basic usage data. Surveys can be simple, comprising just a few questions about how users perceive the service to be useful, and often can be linked directly from the platform. They can help you identify any issues or concerns, track user satisfaction, see if there are changes in the needs of the community, gather demographic information (age, sex, gender identity, languages, country of origin, etc.) to help better understand the target audience, and show participants that you are interested in their feedback.

User surveys are also a great source of information for evaluations. You can include questions related to the metrics in your evaluation and save the results for analysis when the time comes to evaluate. Having the results of a few surveys that were completed at different times and that covered the same or similar questions is great input to evaluations and can help you identify trends, like how participants' needs are changing over time.

We recommend doing them regularly but not so frequently that participants get tired of responding to them. The right frequency will depend on your service, your audience, how you use the information, and requirements – for example from funders or your organization (if you're in one) but a couple of times a year should usually be enough. Mention in your policies, protocols and guidelines that short user surveys will be administered from time to time. Google Forms and Survey Monkey are good free options for developing online surveys.

EVOLVING AND ADAPTING

Be open to making changes to your digital messaging service – how it operates, who can join, how it is moderated, when it can be phased out, what it focuses on, or when you can reduce your related efforts. Sometimes a measure of success is when usage drops, since it can mean that the people it was helping have had their needs met and moved on. That's one of the great things about digital messaging – it can be quickly and easily set up and run, and just as easily shut down when no longer needed.

But decreased activity also could mean that satisfaction has dropped, or that the majority of participants now have different needs you're not meeting. These possibilities underscore why moderation, tracking and monitoring, and evaluation are important – they help to make informed decisions about whether and how to change or phase out your digital messaging community, or even start a new one.



REMOVING PARTICIPANTS

There are two main reasons to remove participants:

- A participant does not adhere to the community guidelines.
- A participant chooses to leave.

In the first case, when you notice a participant is behaving disrespectfully in the group, or asking questions which are not related to the purpose, you may wish to send a private message to remind them of the guidelines and purpose. If the behaviour continues despite warnings (we have found two usually sufficient), you can remove them from the group. Once you have determined that a participant needs to be removed, you should advise them of the removal and then remove them as a user within the platform. This is a simple procedure in all digital messaging platforms. Your guidelines should clearly explain what would make it necessary to remove someone from the group, and to describe that process. When such a situation arises, you need to follow your protocols and enforce the guidelines. Other users will be glad you did, because you are protecting the space for everyone.

In the second case, a user may or may not inform you of their desire to leave. They may stop participating, or delete the group from their device. Or they may request that you remove them. In the first two cases, you don't need to take any action. If they request that you remove them, it's important to do it promptly and confirm removal, while also letting them know they're welcome to come back. Remember to outline in your guidelines how a participant who wants to leave the group can do so. Consider asking them for feedback.

CHAPTER 4.4

Evaluating Results

As noted earlier, evaluating your service can help you keep it useful, and may also be a requirement from a funder. At this stage, ideally you've already developed an [evaluation plan](#) and have been collecting information through [usage data and user surveys](#). So when the time to evaluate comes, you already have a lot of the building blocks in place to conduct the evaluation.

Keep in mind that:

- It's best to do a comprehensive evaluation once the service has been up and running for a while (six months to a year), so that you have enough experience and information to learn from.
- If you're in an organization, it's a good idea to sub-contract an evaluation to an independent third party, to help ensure an objective perspective.
- You'll need a budget for your evaluation which should be built into your resource planning and funding application.
- Once the evaluation is complete, use the results to improve your project design.
- Share the results with users – they gave you the data, so you should share your analysis.
- If you are an individual setting up a digital messaging community as a volunteer, you aren't required to complete an evaluation, but it's still worthwhile to follow these basic principles to learn what your service is achieving and how you could improve it.

[Appendix](#) has more information, links and examples to help you plan and implement an evaluation.

CHAPTER 5

Real-World Examples

In this section we share hands-on experiences that may help you get ideas, learn what tools are right for your purpose, and what you can do to make a real difference in the lives of newcomers using digital messaging.

We've started with the Refugee 613 experience with Refugee 613 Welcomes You to Ottawa because we have been able to test, improve and evaluate the community over three years, and many of the findings can be applied to different models. It's the model we are most often asked about, using a digital messaging group to provide information and referrals to a specific language or diaspora community. We've also included some other examples that help illustrate a range of uses and ways digital messaging can be delivered, and we've highlighted key lessons learned from each one.

5.1 Real World Example #1

Know Your Audience

Refugee 613 Welcomes You to Ottawa - An online community sharing trusted settlement information with Arabic-speaking newcomers
Established by Refugee 613

What it is

Provides information about settlement services for refugees in Ottawa in an Arabic-language group, originally on WhatsApp, now on Telegram.

From a smartphone, Arabic-speaking newcomers can ask questions and get answers from one another and the moderator, get referrals to local agencies providing employment, language, health and other services, and learn about events and workshops in Ottawa related to refugee services.

The group is moderated by staff at Refugee 613, who validate any information provided by group members. Members also get referrals from staff and from information specialists at the YMCA-YWCA Newcomer Information Centre, with whom Refugee 613 collaborates and the moderator connects regularly.

Participants can post a question at any time of day and get an answer within 24 hours, ask questions privately by messaging the moderator directly, or submit a voice note instead of a written message.

Why it started

There has been a significant increase in Arabic-speaking refugees to Ottawa since 2016. Our organization, our partners and the refugee sponsors and refugee communities we connect with found that a lot of conversations were happening within these recently-arrived refugee communities using their smartphones. This was great for community-building. But we realized that refugees may not be getting the most current or accurate settlement information available to them, similar to how word of mouth referrals can lead to wrong or incomplete information in the non-digital world. We heard from community members that they would also like a space that was politically neutral. We didn't want to replace the important newcomer-to-newcomer connections, but we wanted to offer a source of trusted settlement and integration information that people could rely upon for their specific needs as they navigated life in Ottawa.

Why WhatsApp

The target audience we were trying to reach was very digitally savvy and already using WhatsApp within their community. We wanted it to be as easy as possible for them to connect with us. We wanted a tool:

- That was easy for us to set up
- Could be moderated to help ensure accuracy of information
- That allowed us to accept and eject members according to a transparent set of criteria That enabled us to retain a record of the questions and answers for ongoing reference
- Where discussion could be held in the language of the community it served
- That the user would not have to pay for and would be low-cost for us to operate
- In 2020, we switched to Telegram, at the request of group members.

What we needed

A moderator specifically dedicated to the role and fluent in English and Arabic

A laptop and smartphone for the moderator

Office space for the moderator

Community guidelines – we started with a base and adjusted over time

Training for the moderator – a lot of learning was on-the-job, but we documented key points so we have a record in case team members change.

A budget for the things we needed as described above



Key Lessons Learned

Taking the time to plan and understand our audience was critical to our early success. We used an app that they were already using and communicated in their first language. We also didn't try to replace the existing conversations in the community, or the services available to them. Instead, we created a way to connect the conversations and services in a trustworthy way. Our connections within

the settlement services sector and partnership with the YMCA-YWCA Newcomer Information Centre helped ensure the information we were sharing was accurate and useful. Firm implementation of the guidelines was strongly endorsed by group members.

5.2 Real World Example #2

Complement Other Forms of Support (Don't Replace Them)

Ottawa Refugee Sponsorship Groups - A Facebook forum for private sponsors of refugees in Ottawa

Established by a member of a sponsorship group (individual volunteer)

facebook

What it is

- A Facebook group by and for Ottawa residents who are private sponsors of refugees, as well as organizations that facilitate refugee sponsorship
- A forum to support working together & sharing resources
- The group is lightly moderated by volunteers and local settlement professionals post service information and answer questions informally.. Administrators underscore the importance of posting accurate information since they are volunteers without capacity to continuously monitor activity.

Why it started

Being a refugee sponsor has many stages, from applying to be a sponsor, to raising funds, setting up for and meeting the refugees when they arrive, and supporting the refugees once they are here. While each sponsorship group communicates internally among their members and with their co-sponsoring agency, it's also useful to have an easy way for sponsors to share experiences and resources, and trade information and even goods and services. It also allows for experienced sponsors to mentor newer sponsors, and for refugee-serving organizations with important information to get it quickly to sponsors who support them.

Why Facebook

- Facebook was an established tool that many sponsors were aware of or were already using.
- The volunteer who set up the group was comfortable using Facebook.
- Facebook allows for the creation of private groups – i.e., if you want to join you have to request access, which the administrator/s must agree to before you can see what's posted. This provides enough gatekeeping to provide a safer space without requiring extensive infrastructure.
- Moderation is possible but not required all the time.
- Content can be deleted by the administrator/s if it is inappropriate.
- There is no cost to use, join or create a private group, although there are some features that may have a fee.
- Rules can be set up for the group, and can easily be updated.

Key Lessons Learned

The group doesn't replace the systemic mechanisms for support to sponsors. It is a space for handling immediate or less "formal" day-to-day needs, so it saves sponsors time and effort getting practical information and things they need to support the refugees they sponsor. It also creates a sense of community among

sponsorship groups, and allows the organizations that are there to support sponsors focus on the "big things" while sponsors help each other with smaller, day-to-day challenges.

5.3 Real World Example #3

Make Participant Experience a Top Priority

Portail d'intégration franco-immigrant (PIFI)

Created by 5 francophone community organizations in Ontario

- le Centre des services communautaires Vanier
- le Conseil de la coopération de l'Ontario
- le Conseil économique et social d'Ottawa-Carleton
- M9 Médias
- la Société économique de l'Ontario

facebook

What it is

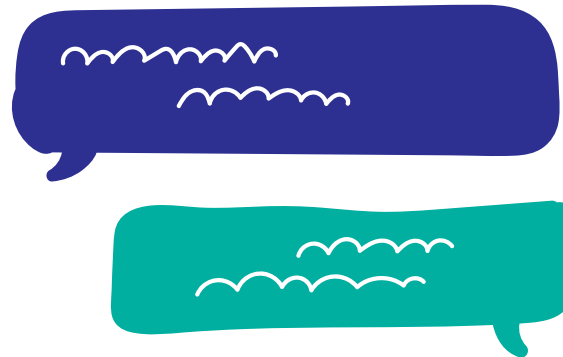
A private Facebook group for francophone newcomers to Canada. Members can ask any question and get answers from settlement professionals within 48 hours on business days.

Why it started

In response to a call for proposals from the DMSI project, the founding organizations identified potential to address a gap by providing useful information to French-speaking newcomers. In individual Canadian communities outside Quebec, francophones may represent a small proportion of the newcomer population, but there is a critical mass of French-speaking newcomers who need information to help them settle.

Why Facebook

- It was a commonly used tool by the partners and the newcomers they serve and there was a high level of awareness of it and how to use it.
- The information can be delivered in French.
- It is accessible from a smartphone, tablet or laptop.
- The group can be moderated, and the administrators have the ability to accept and remove participants.
- It allows for people to share information and experiences informally, but also allows the administrators to respond with vetted answers, post trusted reference materials and/ or ensure validity of the information posted by others.
- There was no limit to the number of participants.



Key Lessons Learned

The founding organizations applied training, including tips learned in a DMSI Community of Practice, about using social media to engage participants. They applied lessons about how to keep the communications light and practical, which led to strong engagement among the target audience. Also, a high level of satisfaction

was based on the moderator's practice of going beyond the basic information to provide personal referrals to websites and organizations that could directly help a participant resolve an issue, and then following up later to see how it went.

Appendix

Appendix 1 – Terms Used in this Toolkit (What We Mean When We Say...)

DIGITAL MESSAGING TERMS

Administrator/Technical Administrator: The person or people who set up and run the digital community and whose usernames and passwords are identified within the tool as the users who can make changes and adjust settings. For example, administrators may set up how people are allowed into a group, accept and remove participants, give other users administrator privileges where appropriate, set up the usage statistics to be collected, promote the service within the platform, and more. Sometimes these tasks are done by or shared with a “moderator” (see definition below).

Digital Messaging: The use of electronic tools – like WhatsApp, Facebook, Slack, text messaging, and others – to create information services or build communities where groups of people who share a common set of interests, goals or challenges connect with each other virtually to exchange information. Information can be shared in text, image, voice/audio or video formats. Digital messaging is usually done on a smartphone but computers and tablets can also be used.

- **One-way digital messaging:** Only the group’s administrator(s) – the person or people who set up the digital messaging tool or service and enable others to join it – may post on the group; members may only read the messages. One-way digital messaging is useful for those who want to share information, activities and events but lack resources to moderate discussions.

- **Interactive digital messaging:** In interactive digital messaging, both administrators and members may post, ask questions, discuss and share information. An interactive group needs more monitoring and supervision than a one-way group.

Digital Messaging Platform, Digital Messaging Tool, Digital Messaging App: In common usage, and in this toolkit, these terms are used interchangeably to refer to the products (like Telegram or WeChat) that are used for digital messaging.

DMSI: Digital Messaging for Settlement and Integration (DMSI) is a project focused on building the capacity of the settlement sector to effectively connect newcomers with timely and relevant information using inexpensive, popular digital messaging platforms. The DMSI project is funded by Immigration, Refugees and Citizenship Canada and implemented by Refugee 613.

Moderator: The person or people who regularly monitor the digital messaging exchanges in a group to ensure that usage guidelines are being adhered to, service standards are being met, and questions are being answered appropriately and/ or as completely as possible. The level of moderation required depends on the unique nature of the group and its purpose. The moderator should also be assigned as a technical administrator, while a technical administrator (see previous definition) is not necessarily a moderator.

Participant/User: people who join the group and participate in information exchange, by posting questions and sharing information and experiences.

Usage/Usage Data: Data about your group – e.g. how many people are in it, how active it is (number of exchanges in a time period), trends in usage over time, demographic information about your participant group. Most digital messaging tools provide standard usage data within the tool itself. You can also collect data through user surveys/feedback forms or customize what data you want to collect within the tool.

TERMS RELATED TO NEWCOMERS

Immigrant: A person who settles permanently in another country. The Government of Canada defines those who are immigrants as “Persons residing in Canada who were born outside of Canada, excluding temporary foreign workers, Canadian citizens born outside Canada and those with student or working visas”¹. Refugees are considered immigrants, but often referred to separately as their immigration status and settlement needs are often different from economic immigrants.

Newcomer: People who have come from another country to live in Canada in the last 5 to 10 years. Immigrants and refugees (see definition below) are newcomers. We use this term loosely, as some immigrants who have been in Canada for three years are more successfully integrated than others who have lived in Canada for 20 years.

Refugee: According to Immigration, Refugees and Citizenship Canada, “Refugees are people who have fled their countries because of a well-founded fear of persecution. They are not able to return home... [and] have seen or experienced many horrors. A refugee is different from an immigrant... Refugees are forced to flee”². Refugees have, in many cases, had to live in refugee camps for many years and when they arrive in their country of refuge, they’re faced with starting their lives over again.

Refugee Sponsors: Groups of people or organizations who help refugees to enter and settle in Canada as part of the private sponsorship program. Sponsors are financially responsible for the refugee for the first year they are in Canada. They also commit to helping with various aspects of settlement and integration such as arranging housing, transporting refugees to their new home upon arrival to Canada, organizing welcome events, and helping them identify and access services that will support their settlement and become integration into their new country.

¹ <https://www150.statcan.gc.ca/n1/pub/81-004-x/2010004/def/immigrant-eng.html>

² <https://www.canada.ca/en/immigration-refugees-citizenship/services/refugees/canada-role.html>

Settlement Services Agencies: These immigrant-serving non-governmental organizations offer a range of services that help newcomers settle and adjust to their life in Canada. Such services can include: temporary accommodations and housing assistance; orientation about education; employment services; health services; support with official documents and processes (e.g. immigration documents); referrals and support with access to other services; connections to their new community; language assistance to improve fluency in English or French; programs for children and youth; mental health; and counselling services.

Immigrant and Refugee-Serving Sector: Refers to refugee sponsors, settlement services and agencies (defined above), and related organizations that are involved in creating an environment that is welcoming to and supportive of newcomers to Canada. This may include government agencies, organizations that promote refugee human rights, community organizations, and hubs like Refugee 613 that help connect and inform people involved in the sector.

TERMS ABOUT DEFINING AND MEASURING RESULTS

Please refer to Appendix 4 for examples and templates that help illustrate some of the following:

Program Evaluation: The systematic assessment of the design, implementation and/or results of an initiative. Evaluations can be conducted to learn from experience, make decisions about the future of an initiative (e.g., plan next steps or make adjustments) and report on results. Evaluations provide a structured way to get information that helps keep initiatives useful and relevant.

An evaluation plan can be developed at the start of an initiative. The plan typically sets out some or all of the following:

- the purpose for evaluating (e.g. to assess a pilot, inform future program design, report to a funder)
- the questions it will be designed to answer (e.g. Is it achieving what its purpose? What can be improved? Is it still relevant/needed?)
- the methods of data collection (e.g. statistics on use, user surveys, focus groups, key informant interviews, externally sourced data)
- the timing and frequency of evaluations (e.g. every 3 years)
- who carries out the evaluation (e.g. an independent body or contractor).

Sometimes evaluation plans also include a set of guiding principles (e.g., principles related to the safety of participants/service users, ethics, confidentiality and privacy, diversity). These principles guide the selection of data collection methods and data sources.

Indicator: An indicator is the evidence that a result has been achieved or the extent to which progress is being made toward it. The term, Key Performance Indicator (KPI), is commonly used to refer to indicators that will provide the best or most relevant evidence of progress toward a specific desired result. For example, if you established a digital messaging group to help connect groups of sponsors with one another, a KPI could be the percentage of sponsorship groups who are members of your digital messaging community compared to the total number of sponsorship groups in the geographic community being targeted. The higher the percentage, the stronger the evidence that the result is being achieved. It is important to use KPIs to measure progress when carrying out evaluations.

Monitoring: Monitoring is the practice of regularly tracking and analyzing information that can help you understand progress, potentially make adjustments to your service, and, or, carry out evaluations. For your digital messaging service, you may monitor usage (e.g. change in number of users over time, changes in activity within the group through statistics available in your platform), user satisfaction (e.g. via regular surveys), or observe how conversations in your group evolve over time. It is easier to evaluate your service if you include monitoring into the regular work flow of the service – instead of adding it in later.

Results Framework: A results framework is a broad term referring to the use of a structured approach for deciding and documenting what you want to achieve, and how you will go about achieving it. The following terms are related to a results framework:

- **Logic Model:** Also known as *logical framework analysis*, *log frame* or *results-based management framework*, a logic model is a way of visually demonstrating the relationship between your goals and the measures you take to achieve these goals. It helps you analyze ways to achieve your desired results.
- **Theory of change:** Similar to a logic model, this is a type of methodology for planning, participation, and evaluation that is used to promote social change.³ Theory of change defines long-term goals and then maps backward to identify necessary conditions for reaching the goals. An “Outcomes Framework” is used to articulate the precise link between the activities we undertake and the achievement of our long-term goals, thereby contributing to a precise understanding of how change actually happens.
- **Performance measurement framework (PMF):** PMF is a tool used for planning the collection of relevant information for monitoring, learning and reporting. It identifies results in relation to your – short, medium and long-term goals as set out in your logical model (or similar); key performance indicators that will help your progress; and, the approaches you will use to collect and analyze your progress.

³ <https://www.theoryofchange.org/what-is-theory-of-change/>

Appendix 2 – Usage Statistics – Template and Example

The following table is an example of usage data that you may collect to monitor trends and potential issues in your digital messaging service. They can also be useful for reporting and evaluation.

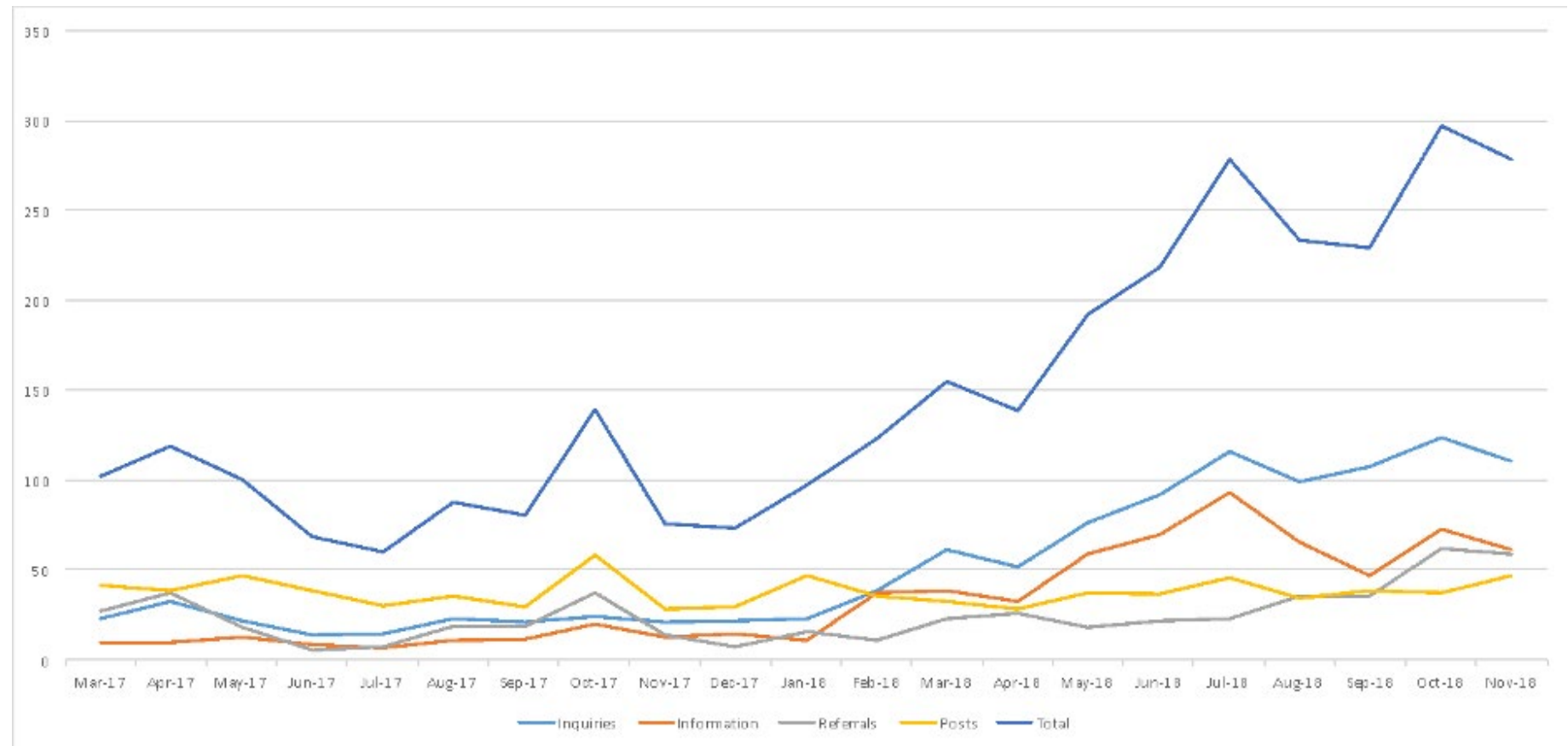
Table 7 – Usage Statistics Sample Template

Reporting Period	Reporting Period 1: Insert start + end dates	Reporting Period 2: insert start + and end dates	Reporting Period 3:insert start + end dates
Usage	# in reporting period 1	# in reporting period 2	# in reporting period 3
Total number of users	Insert total membership in the group at the end of the period		
Number of new users who joined	Insert number of people who joined as new users in the period		
Number of users who left the group	Insert number of people who formally requested to be removed from the group in the period		
Number of users removed by the moderator, based on community guidelines	Insert number of people who were removed by the moderator e.g. due to inappropriate behaviour		
Number of questions answered (excluding private messages)	Insert number, excluding private messages		
Number of group/ community participants	Insert number of group members who participated in exchanges during the period		
Number of private messages	Insert number of private messages		
Number of posts (e.g., job postings, workshops, information)	Insert number of posts (by type, if relevant)		

The next table (Table 8) is an example of a chart that Refugee 613 used to identify usage trends based on usage data collected and then investigated what caused the increases and decreases in activity, to help us better understand the audience and our model.

Table 8: Evolution of the Refugee 613 *Welcomes You to Ottawa* Activity

Source: *Refugee 613 Welcomes You to Ottawa Database - March 2017-Nov 2018*



Appendix 3 – Examples of Community Guidelines

Below are two sets of community guidelines (the second one is called a Policy Statement) that have been used in real-life digital messaging groups in the refugee settlement context. They may be used as a reference in developing guidelines for a similar purpose.

COMMUNITY GUIDELINES: REFUGEE 613 WHATSAPP GROUP

This Telegram group was created to give Arabic-speaking newcomers accurate information related to settlement, and increase their use of settlement services. This description is given to anyone who wishes to join the group beforehand, which helps us manage the group in a fair and professional manner.

We want members to feel safe and comfortable when using this group. For that reason, we have developed a set of Community Standards, outlined below. These policies will help you understand what type of sharing is allowed in the group, and what type of content may be reported to us and removed. Because of the diversity of our community, please keep in mind that something that may be disagreeable or disturbing to you may not violate our Community Standards.

Privacy and Safety: We want the members' personal information to be protected. For inquiries or questions that may contain confidential information, personally identifiable information, or sensitive personal information, we encourage the members to privately message us on Telegram.

Offensive Content: We don't allow the promotion of any of the following: hatred; violence; harassment; threat; racism; sexual intolerance or vulgar and obscene language and behaviour. Content that is likely to shock or disgust and content that is exploitative or appears to unfairly capitalize at the expense of others will also be considered offensive. Members who post offensive content will be removed and blocked. Under certain circumstances, rejoining the group might be possible but not guaranteed.

Extraneous Content: This group was created to help answering members' questions and inquiries about services available for newcomers in Ottawa. No personal, religious, or political posts are expected to be shared on this platform. If a member posts something that is viewed by the administrator as religious, political or personal, the following steps will be taken:

- The post will be deleted
- The group's description will be reposted to remind the members of the group's acceptable topics to discuss and inquire about
- The individual who is responsible for the post will be asked to respect the group's guidelines, and will be pointed towards other groups that are suitable for such post "depending on whether the post is religious, political, or personal"
- A message will be sent directly to the member asking them to stick to topics and inquiries related to settlement and newcomers, they will also be reminded that if they do not wish to abide by the guidelines, they will be removed from the group.

- If the member refuses to follow the guidelines and posts another unsuited post, they will be removed from the group. The administrator will post to the group that the individual was removed because he or she did not abide by the guideline

Advertising: No commercial or personal advertising will be allowed. If a member wants to promote a relevant event or share a useful opportunity with other members, they will be asked to privately message it to us on Telegram.

Positive Behaviour: We value diversity and respect for others. For this reason, we expect members to respect the questions, inquiries and comments of other members. Participation and involvement is encouraged.

Response Timeframe: We want to provide the group's members with accurate, reliable and timely information. Refugee 613 will do its best to answer inquiries within 24 hours. If the inquiry is complex and requires more time to find the most accurate and complete answer, we will relay that information to the member and assure them that we are working on finding the answer to their inquiry.

Feedback: The members' suggestions and ideas are important to us, as well as their participation. In the event of members posting answers to inquiries:

- The answer will be checked, and its accuracy and completeness will be verified.
- The member will be thanked for taking initiative and answering the inquiry.

- Refugee 613's team will either confirm the accuracy and completeness of the answer and add to it by giving more information, or will provide a different answer while explaining how the answer provided by the member was inaccurate or incomplete.

We are looking forward to helping you by making sure your inquiries are answered, and to help make your settlement in your new home a pleasant experience. We also look forward to your participation and feedback. Welcome to Refugee 613's group!

POLICY STATEMENT CALGARY CENTRE FOR NEWCOMERS

Policy and Procedures for Case Management by Digital Messaging System (CMDM) Policy

1. Purpose

This one on one digital form of communication includes WhatsApp messaging, text messaging, voice notes, as well as phone calls and video calls, in certain cases, that will be used to provide case management activities to eligible clients. The goals are to have ongoing contact and communication with the clients to help them change their circumstances and settle in Canada in an easy, fast and accessible way by reducing barriers of travel, cost and time.

Digital Case management will be based on individual client intake that will be planned, documented and filed in the Centre for Newcomers' (CFN) database.

Being a registered client with the program will require following the program policies as part of ongoing case management. These policies are in line with the case management approach of CFN's organizational standards, policies and practices. These policies are made to protect clients' shared and received information, in order to support clients in achieving their desired outcomes, as well as maintaining satisfaction with the supports and services they are receiving.

Gathering and sharing client information is done to obtain a full understanding of the clients' needs and circumstances in order to provide clients with fast, accessible and ongoing service that meets their needs. Both the organization and clients will have to comply with the following protocols and policies during the use of this CMDM system.

2. Information Sharing and Protection of Privacy:

Any shared information or received information shall be confidential and not to be shared with the public.

An individual intake will be held with each client to create a file, after which ongoing digital messaging will take place.

A consent form will be signed as an acceptance to be provided with the service. Based on the consent form all information shared will be confidential and will not be shared with anyone outside of the circle of care without explicit permission from the client. Implied consent will only occur in certain cases, as outlined in the consent form and according to CFN organizational policies.

In cases of emergencies that are a risk to personal safety or safety to others, emergency providers or emergency contacts may be notified following CFN policies.

3. Complex Service Needs:

Individuals will be advised to come in person to CFN or will be referred to another agency or resource depending on the nature of the case, to discuss any complex matters that includes sensitive information outside of the scope of the role of the CMDM worker.

4. Offensive and/or Aggressive Content:

We appreciate the use of respectful language, and will not tolerate any form of hatred, violence, harassment, threats, racism, sexual intolerance/ vulgar or obscene language when sending any message.

We advise that the content of any message regarding your case does not address any personal life issues.

5. Extraneous Content:

If any personal, religious, or political questions are asked, it will be addressed in a way that relates to the client case.

If a client sends something that is viewed by their case manager as inappropriate, a detailed description will be re-posted to remind the client of acceptable topics to discuss and why the content of what they sent is not related to their case.

If the client refuses to follow the guidelines and sends another unsuited post, they will be asked to come in person to CFN to discuss their issues. Depending on the nature of the content, the case manager may end the CMDM.

6. Response Timeframe:

After creating a file for a client, the case will be followed up with through the digital messaging system. When the client messages an inquiry about their case or a related matter, they will receive an

answer within 24 hours. If a client's case is complex and requires more time to find the most accurate and complete answer, and will require some research on their case, the case manager will relay that information to the client and assure them that we are working on finding the answer to their inquiry.

If an inquiry is received outside of regular working hours of 9:00 a.m. to 5:00 p.m. from Monday to Friday, the response timeframe will begin during the next working day at 9:00 a.m. If an inquiry is received on Friday after 5:00 p.m., Saturday or Sunday, the response timeframe will begin on Monday at 9:00 a.m. No inquiries will be responded to outside of regular working hours.

7. Phone calls and video calls

Phone calls and video calls are not encouraged since this system focuses specifically on testing the use of digital messaging. While voice notes are permitted, phone or video calls will only be used at the discretion of the case manager in limited circumstances.

8. Feedback:

Client suggestions and ideas are important to us, as well as their participation, in order to enhance and improve the service. We appreciate client feedback and suggestions and can be reached by e-mail at to receive this information. In addition, satisfaction surveys will be required to be completed by clients receiving this service on a regular basis.

9. Questions:

Questions should be related to their own case and settlement and integration goals., Therefore, questions should not be personal, illegal or unprofessional, and clients will be reminded of the purpose of the group and the support provided by this system. If these types

of questions persist, the case manager will follow CFN procedure to limit or cancel services for this client.

10. Follow up:

Clients will be informed to keep in contact regarding any further matters or concerns that they will have regarding their case.

The CMDM will create a follow up method to check on clients, and make sure that they are doing well as their case progresses. In order to make sure that client's cases are up-to-date, follow ups will be done on a weekly basis, and will be based on the level of interactions.

The CMDM will follow up with each registered client as needed, and monthly to make sure that they are doing well with their settlement process.

Appendix 4 – Resources for Defining and Measuring Results

The following charts and tables are intended to illustrate the types of frameworks that can help you plan, design, measure and evaluate your digital messaging service in a structured manner. Although terminologies vary, the examples provided illustrate some common and useful principles. There are many resources available on the web that you can also consult and adapt to your specific needs. Some resources you may wish to consult include:

- [Canadian Evaluation Society](#)
- [Evaluation in the Government of Canada](#)
- [United Way Toronto and York Region “Evaluation Resources \(2014\)”](#). This is an evaluation guidebook that is more community-focused than government focused and may be helpful to community groups and agencies
- [Immigration, Refugees and Citizenship Canada Settlement Program Logic Model](#)
- [Charity Village: A Beginner’s Guide to Key Performance Indicators](#)

Some resources you may wish to consult



Table 9 – Results Framework Sample

Result level (What it's called and what it means)	Description
<p>Activities</p> <p>These include the work that goes into creating and sustaining your digital messaging.</p>	<p>e.g.:</p> <ul style="list-style-type: none"> Select digital messaging tool Establish digital messaging guidelines Set up the group Invite/ Onboard participants Moderate the group Access funding Etc.
<p>Outputs</p> <p>These are products and/or services resulting from your activities. You could have one output which is your digital messaging group, or you may want to break it down into a few key components, whatever is most practical to your purposes or that you may need to report on</p>	<p>e.g. Operational digital messaging group for x audience</p>
<p>Short term results (or Immediate Outcomes)</p> <p>These are the results that your outputs will directly lead to each one may be linked to one or more of the outputs.</p>	<p>e.g. The target audience is using the service</p>
<p>Medium term results (or Intermediate Outcomes)</p> <p>These are longer term results that your service makes a contribution to; other external factors may also play a role in these results.</p>	<p>e.g. Target audience is accessing settlement services relevant to them.</p>
<p>Long term result (or Ultimate outcome)</p> <p>This the change you want for the community. Your service is likely one of many factors contributing to this.</p>	<p>e.g. Target audience is settling into the community more easily than before</p>

The following diagram (Table 10) illustrates a logic model in a results chain. It shows how the activities and outputs of the service are connected to the results you are trying to achieve, and the mission or mandate of your organization or group. For a simple digital messaging service, you may only have one or two outputs.

Table 10 – Illustration of Results Chain Logic

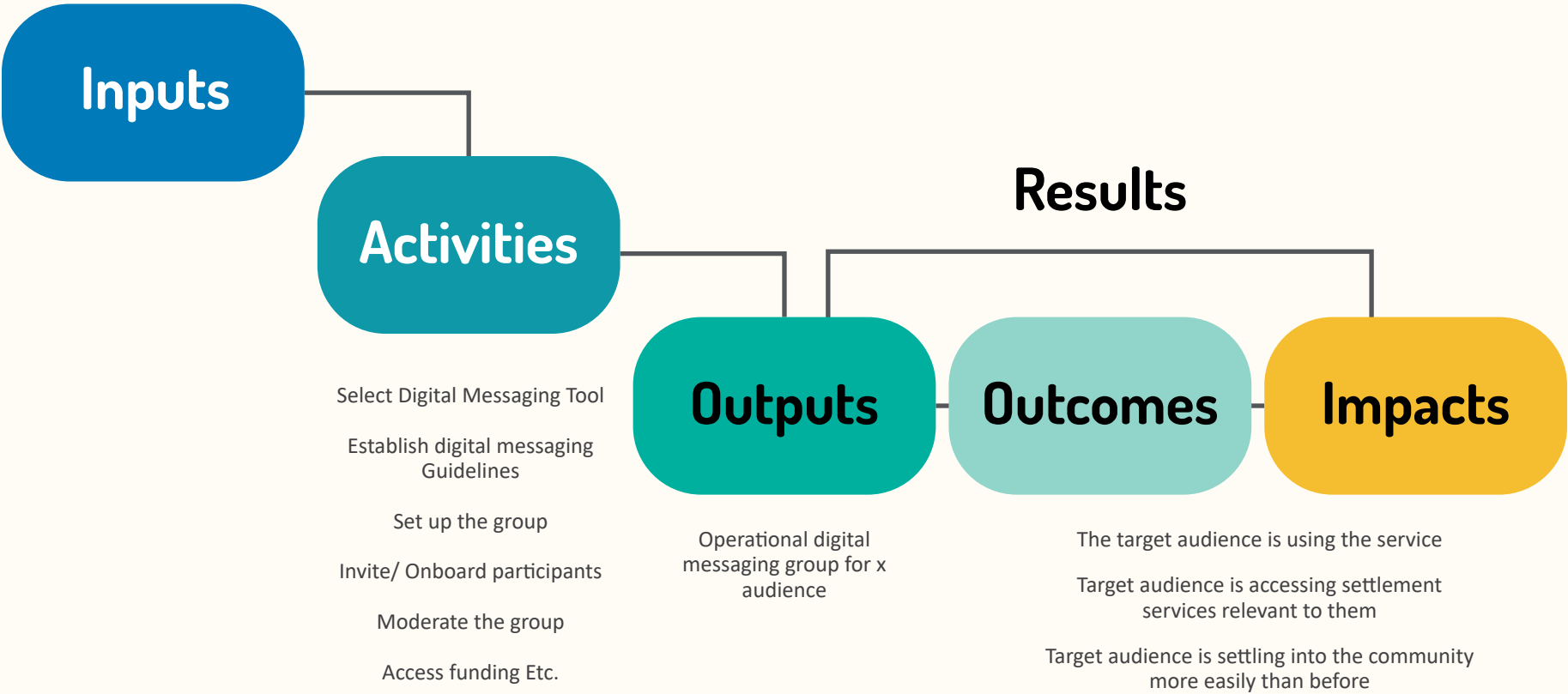


Table 11 presents a sample performance measurement framework (PMF) based on the above Results Framework Sample above. The PMF can be a simple table that sets out how you can gather evidence to measure progress toward your intended results.

Table 11 – Template of a Performance Measurement Framework

Result Level	Description	Performance Indicator(s) (Evidence that helps to measure progress)	Target (what you hope/ expect to achieve)	Data Source/ Collection Method (where the information will come from)	Responsibility for Collection (Who is responsible for collecting/recording the information?)	Timing/Frequency
Outputs (directly linked to your digital messaging)	e.g. Operational digital messaging for x audience (you may have more than one output)	e.g: Service is up and running Participants are joining (you may have several indicators for each output/ result)	e.g. Date by which you expect to have the service operational (each indicator should have a target)	e.g. Project files (each indicator will have a source of the evidence)	e.g. moderator (specify the information each person collects)	e.g.3 months from project start (frequency and / or timing for collecting and recording the evidence for each indicator)
Short term results/or Immediate outcomes (directly linked to your digital messaging service)	e.g. Target audience is using the service	e.g. Number of participants Change in number of participants	e.g. 500 by March 2022 % increase month over month	e.g. Digital messaging tool usage statistics	e.g. Moderator	e.g. Monthly
Medium term results/ Intermediate outcomes (Your digital messaging service plays a role along with other factors)	e.g. Target audience is accessing settlement services relevant to them					
Long term result/ Ultimate outcome (Your digital messaging service is one of many contributing factors)	e.g. Target audience is settling into the community more easily than before					

Table 12 is an adapted example of a framework used by Refugee 613 when we started planning the digital messaging initiative that became *Refugee 613 Welcomes You to Ottawa*. It demonstrates how the concepts in Table 10 were adapted and applied to a real life and rapid project planning situation.

Table 12 - Real-World Example of a Results Framework

Draft Project Framework	
	Intervention Logic
Project Objective(s)	<p>This project aims to:</p> <ul style="list-style-type: none"> · Improve referrals and bring high-quality information to the Arab refugee and newcomer community in Ottawa. · Maintain and enhance digital presence by growing on social media and increasing online involvement. · Seek out and build relationships with the Arabic speaking online communities. · Establishing a reputation as a trusted source of information and referrals. · Develop and implement a refreshed project strategy that is transferable and can be interchanged with other agencies.
General Objective(s)	<ul style="list-style-type: none"> · The overall objectives come on the longer-term: · Foster connection by centralizing the role of social media · Highlight the significant role social media plays in filling the communication gap between the audience and the service provider agencies in the settlement sector · Bring partners closer to the audience by making them present in the communication-space refugees and newcomers use to deal with their daily-life challenges · Test the efficacy of this digital medium in the resettlement information and referral system and sharing remarks with partners.
Expected Results	<ul style="list-style-type: none"> · Better quality of online information and referrals. · Higher and more consistent digital presence. · Closer relations with the newcomer Arabic speaking communities. · Creation of a consistent digital tool to assist Arabic-speaking refugees and newcomers in Ottawa. · Communication gap filled between audience and service providers.
Output	<ul style="list-style-type: none"> · A moderated digital outreach forum for Arabic-speaking immigrants and refugees
Activities	<ul style="list-style-type: none"> · Select a digital messaging tool · Set up a group in the tool · Establish user guidelines · Onboard and offboard participants · Promote the group · Answer questions by providing information · Provide referrals to inquiries that need to be directed for assistance – those that are specific or have some level of complication to them · Post updates, relevant events, opportunities and offers

Source: Adapted from Pilot Project Digital Outreach - Refugee 613 (January 2017)

Appendix 5 – DMSI Information Sheet

Digital Messaging for Settlement and Integration (DMSI) Project Update, 2019

(DMSI) is a national project exploring how digital tools can address the information gap between newcomers and settlement services, and provide added value to those services. Led by Refugee 613 in partnership with pilot sites in Calgary, Halifax, Ottawa and North Bay, the project is funded through IRCC's Service Delivery Improvement portfolio.

WHAT IS DIGITAL MESSAGING (DM)?



Digital messaging is used to send text messages, images, documents, voice/audio and video messages through a smartphone, computer or iPad by using digital messaging apps, such as **WhatsApp, Viber, Telegram, Signal, Kakaotalk, Line, BlackBerry Messenger (BBM)** or by text (SMS/MMS).

GOAL

The goal of the project is to improve the settlement sector's communications and capacity to reach newcomers and refugees with the right information at the right time.

PHASES

1. Pilot evaluation & environmental scan
2. Identification & development of partnerships with national pilot sites
3. Implementation and developmental evaluation
4. Impact evaluation and national conversation

DMSI PROJECT TEAM

Louisa Taylor
Nelson Jean-François
Jacqueline Stol
Lama Chami

National environmental scan consultant:
Marco Campana

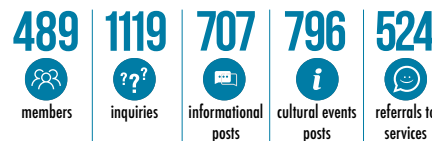
Evaluation consultant:
Siena Consulting

DMSI PILOT PARTNERS

Immigrant Services Association of Nova Scotia, Centre for Newcomers, North Bay & District Multicultural Centre, Centre des Services Communautaires Vanier, Conseil Économique et Social d'Ottawa-Carleton, Société Économique de l'Ontario, M9 Médias/Groupe Afrique Plus, Conseil de la Coopération de l'Ontario.

PILOT EVALUATION: REFUGEE 613 WELCOMES YOU TO OTTAWA

Refugee613 Welcomes You to Ottawa is an outreach initiative to provide high-quality information and referrals using digital tools – specifically, a moderated WhatsApp group delivering quality information and referrals in Arabic to refugees and newcomers in Ottawa. Group members can ask settlement-related questions 9am to 5pm, Monday to Friday, and receive answers from Refugee 613's Digital Community Manager and partner agency the YMCA Newcomer Information Centre. The Digital Community Manager also shares general information about local services and programs, including settlement services as well as cultural events.



Source: Project database from March 1, 2017 to November 30, 2018.



I have a baby at home and cannot attend English school. The group helped me connect with a program that provided me with a teacher who comes to my house."

KEY FINDINGS

85%

of members use the group at least once a day

81%

of members use the group to gather information about government and related services (health care, child support, etc.)

78%

of members use the group to obtain information related to immigration/refugee status in Canada

IMPACT AND BENEFITS OF THE WHATSAPP GROUP FOR USERS AND SETTLEMENT AGENCIES

- According to members, the group helps them to save time and money.
- According to settlement agencies, the group is a centralized source of reliable, trusted information to answer the real, current questions that refugees often need answered quickly.
- According to members, the group helps them to navigate the settlement system and find the information they want.

SUCCESS FACTORS

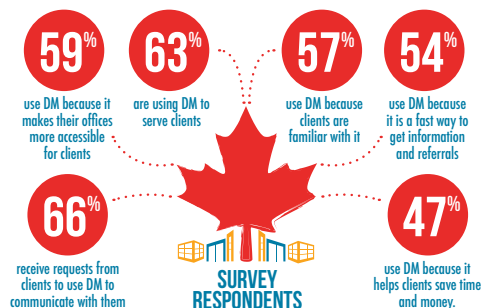
- The WhatsApp platform is familiar to the target audience.
- The group is moderated by a knowledgeable staff member, a full-time Refugee 613 staff member, who knows the language and the culture of the participants very well.
- The group refers clients to all services within Ottawa, and does not represent or promote only one settlement agency, reducing the need to belong to multiple groups.
- Refugee 613 and the Y-NIC created strict community guidelines and continually monitors the group to ensure it remains apolitical, non-religious and a "safer space" that is free of bullying or intimidation. This has contributed to a sense of welcome and safety for all.
- Before sending any information to the group, the moderator makes sure that it is accurate to the best of their knowledge. This has helped build the credibility of the group.
- The participants are happy to be able to receive and send information in their language.

POTENTIAL FOR IMPROVEMENT

- Incorporate specific user feedback in the context of program and broader organizational purpose/mission.
- Formalize a program logic model and performance measurement plan.

NATIONAL ENVIRONMENTAL SCAN RESULTS

The environmental scan used a mix of quantitative and qualitative data, including 24 individual interviews, 2 focus group discussions, a literature review and a survey completed by 332 settlement practitioners across Canada (English and French). Analysis of the data collected found the following:



SUCCESSES

- Respondents reported that using DM helps increase access to the settlement worker, improves the effectiveness and efficiency of communication with clients, and supplements face-to-face interactions.
- DM keeps case managers connected to clients at all times and gives them reassurance that they can connect with them in the way that they are most comfortable.

CHALLENGES

- Frontline workers highlighted a boundary challenge, with some clients expecting to receive answers after working hours.
- Managers see funding as a challenge when it comes to purchasing smartphones and internet connection for all staff who could need it.
- There also is a potential for exclusion for clients who may not have access to smartphones.
- Availability of the DM service in other languages is also an area that needs improvement.

WHAT'S NEXT?

- Four pilot sites are exploring different models of using DM for settlement in 2019-2020.
- Plans under way for a national workshop on digital messaging for settlement in Ottawa in 2020.

Do you want to know more about the DMSI project or share your own experience using digital tools for settlement?

Email the project team: dmsi@refugee613.ca

{ REFUGEE } 613

Funder:



Immigration, Refugees and Citizenship Canada

Immigration, Réfugiés et Citoyenneté Canada